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(54) Title: AN INDIVIDUAL TRIGGERED AND DIRECTED DONATION SYSTEM AND METHOD

(57) Abstract:

AN INDIVIDUAL TRIGGERED AND DIRECTED DONATION SYSTEM AND METHOD

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FIELD OF THE INVENTION

The present invention pertains to a method and system for conducting a donation transaction.

15

BACKGROUND OF THE INVENTION

Collection of monies or other considerations by charities, funds, and various types of Organizations, has historically been a cumbersome and time extensive procedure.

20 Typically, charities or Organizations must first contact, then lobby private industries or other donors with a particular marketing "pitch" in an attempt to convince the donor to donate money to the charity or non-profit Beneficiary. This method of collection requires a large amount of human resources to operate.

25 A donation transaction apparatus and method for facilitating donations to charitable Organizations is provided in U.S. Patent No. 5,909,794. The apparatus is configured to receive coins or, in some embodiments, cash or funds transfer authorization or credit charges, and preferably dispenses a donation receipt to the user which the user may use to prepare or document income tax returns. Preferably, the user is able to

30 select among a plurality of charitable Organizations to receive the donation.

U.S. Patent No. 6,088,682 provides an automated way for sales establishments to extend point of sale (POS) cash transactions to allow consumers to save change or

transfer discretionary funds into saving or donating accounts managed by a central clearinghouse. The system includes a network composed of consumer/payors with identification cards, neutral merchants who enter data and funds into remote POS terminals, a central clearinghouse that offers/processes accounts, and service providers for participating consumer/account holders, i.e. nonprofit giving, travel, mutual funds, savings, etc. The network provides consumers with a seamless, convenient, and painless way to save/donate every time they spend at multiple POS counter locations.

Each of the above examples typically collects monies from an Individual or consumer and not typically from a business like a corporation or a Sponsor. In addition any donations received from a business are directed by the wishes of the business. There is therefore a clear need for a more efficient and effective method of collecting such donations from businesses, while providing the consumer with the choice of recipient of the donation.

This background information is provided for the purpose of making known information believed by the applicant to be of possible relevance to the present invention. No admission is necessarily intended, nor should be construed, that any of the preceding information constitutes prior art against the present invention.

SUMMARY OF THE INVENTION

An object of the present invention is to provide a system for enabling an Individual to direct a donation of some value from a Sponsor to a Beneficiary. Such means is organized in a manner that allows a Sponsor to associate their name with the donation program and the Beneficiary, thereby bringing benefit to the Sponsor. In general, following an event such as the purchase of a Sponsor's goods or services, an Individual will be provided with a Sponsor-determined list of Beneficiaries from which they can select one that they wish to support with the donation. In certain embodiments an Individual may use the system to simply direct a donation to a Beneficiary, such as in an Employee Contribution Program.

In one aspect of the present invention, the system is embodied on a computer-readable

medium enabling an Individual to direct a donation from a Sponsor to an Beneficiary, said donation system comprising, one or more of each of the following elements: a database of Beneficiaries participating in the system; a database of Sponsors participating in the system and their Terms of Donation (TOD); a matching means
5 enabling the creation of a Sponsor-selected Beneficiary list; an event-triggered entry point for an Individual, whereby the completion of an event results in the generation of an Event Value (EV); a selection means for enabling an Individual to select a Beneficiary from the Beneficiary list; a contribution means which receives Beneficiary selection information, the Event Value information and the Terms of Donation
10 information, subsequently determining the donation; and forwarding this information to the financial means for performing or monitoring transfer of the donation from the Sponsor to the Beneficiary.

BRIEF DESCRIPTION OF THE FIGURES

15 Figure 1 is a schematic of the donation system according to one embodiment of the present invention.

Figure 2 is a schematic of a further embodiment of the present invention.

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Figure 3 is a schematic of a further embodiment of the present invention.

Figure 4 is a schematic of the architecture of a donation system operating according to one embodiment of the present invention.

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Figure 5 depicts a computer screen according to one embodiment of the present invention, in which Company.CA identifies itself as a Sponsor in the donation system.

Figure 6 depicts a computer screen according to one embodiment of the present
30 invention, which may result after the purchase of a product from Company.CA.

Figure 7 depicts a computer screen according to one embodiment of the present

invention providing a list of causes to which the Individual can effect a donation to from Company.CA.

Figure 8 depicts a computer screen according to one embodiment of the present invention providing an Individual with the choice to refer a "friend" to the donation system.

Figure 9 depicts a computer screen according to one embodiment of the present invention providing information regarding the donations from a plurality of Sponsors to selected Beneficiaries.

Figure 10 depicts a computer screen according to one embodiment of the present invention, providing a means for an Individual to select a cause to which a donation is to be made by a Sponsor.

Figure 11 depicts a computer screen according to one embodiment of the present invention, providing a means for an Individual to identify which Sponsors which support causes of their preference.

Figure 12 depicts a computer screen according to one embodiment of the present invention, providing a means for an Individual to view the donations made by each Sponsor to a respective cause.

DETAILED DESCRIPTION OF THE INVENTION

Definitions

The term, "Sponsor", means a company, a business, an Individual, or a group of Individuals that wish to contribute, donate or grant monies, other consideration, or things of value upon the sale or use of their goods and/or services or some other event. The Sponsor might seek to transfer money or supplies to a Beneficiary, for example.

The term, "Beneficiary", comprises a company, an Individual, a group of Individuals,

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The term, "off-line" means any means other than "on-line".

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The term "Event Value (EV)" is used to describe the "value" of the action performed by an Individual, wherein performing said action provides a means for the Individual to participate in the donation system. The "value" of the action is not restricted to
5 monetary value but may be based on for example the number of surveys in which an Individual has participated. Each of these actions are connected to the donation system of the present invention. For example, the purchase of 1 bottle of water, the purchase of 10 bottles of water, or the participation of an Individual in a survey may each have a particular identified Event Value associated with each of them.

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The term "Terms of Donation (TOD)" is used to describe the method and criteria by which the donation to be made by a Sponsor to a Beneficiary is determined. For example, the TOD can be based on a formula, which determines the value of a donation based on a particular EV, or a TOD may define the donation as a specified
15 value or item. The TODs can be predetermined by the Sponsors participating in the system and are stored in the Sponsors database.

Unless defined otherwise, all technical and scientific terms used herein have the same meaning as commonly understood by one of ordinary skill in the art to which this
20 invention belongs.

The present invention provides a system and method enabling Individuals to participate in selecting causes sponsored by businesses, where the businesses (Sponsors) contribute a portion of the proceeds from the sale of goods or services or
25 any other form of donation, to Beneficiaries, which enables businesses to identify and link the sale of products or services to specified Beneficiaries and/or causes. An event, such as purchase of a product or service or an interaction with the Sponsor, which defines an Event Value, triggers the contribution and transfer of the donation from the Sponsor to a Beneficiary, wherein this contribution is calculated based on a
30 set of predetermined Terms of Donation. Participation in this system can be advertised by presenting a system logo in association with the business or product name, which provides a means for brand or company distinction in the marketplace.

- This invention facilitates the financial support of Beneficiaries such as charitable Beneficiaries, causes, funds, hospitals, schools and universities, etc., while providing a neutral and legitimate means for Sponsors to contribute to Beneficiaries, thereby
- 5 linking their company or product name to an Beneficiary and/or cause. The invention also provides marketing benefits to businesses in acquiring new customers, retaining current customers and enhancing a company's recognition as a "socially responsible" entity.
- 10 The Sponsor associated with a particular good or service registers said product or service with the Operator of the donation system such that when an Individual purchases or uses the goods or services of a Sponsor, a predetermined portion of the monies paid are channeled from the total money paid for the goods and/or services to an Beneficiary as a donation or grant (monies or otherwise). A further working
- 15 embodiment to this invention may or may not involve the Operator further channeling an additional predetermined portion of either the: (1) total money paid for the goods and/or services of the Sponsor, (2) total donation channeled from the total money paid for the goods and/or services of the Sponsor; or (3) both (1) and (2).
- 20 In one embodiment of the present invention, a donation made by a Sponsor to a Beneficiary, may take the form of a product which is manufactured by said Sponsor. For example, a computer manufacturing company may donate one computer to a Beneficiary upon the purchase of a predetermined number of machines from the Sponsor by Individuals.
- 25 In one embodiment, the Sponsor chooses several Beneficiaries to be linked with one of its products or services or the business as a whole, thus creating a Beneficiary list which is associated with the particular product of a Sponsor or the Sponsor as a whole entity. For example, a Sponsor which produces a plurality of products covering a
- 30 wide range of areas (for example, one Sponsor may produce shoes, clothes and food) may decide that products related to shoes and clothes will be associated with Beneficiaries which are assisting in clothing the less fortunate, resulting in a

Beneficiary list. An Individual entering the system after the purchase of a pair of shoes is presented with the Beneficiary list associated with clothing the less fortunate.

In contrast, the Sponsor as a whole may wish to be associated with Beneficiaries connected with disaster relief, which results in the creation of a Beneficiary list,

- 5 wherein this Beneficiary list is present to the Individual entering the system after the purchase of any product of the Sponsor.

In one embodiment, the Sponsor commits a certain percentage of sales or profits or a specified amount (Terms of Donation) that will be transferred to the selected

- 10 Beneficiary. Each time an Individual purchases the product or service or interacts with the Sponsor that is registered in the program, an Event Value (EV) is generated, and the Sponsor donates the stipulated percentage or amount to the Beneficiary selected by the Individual from the associated Beneficiary list, wherein this donation is determined based on the Terms of Donation and the Event Value. One method of
- 15 payment would be to report the number or value of the sales each month, to the Operator who can collect the money from the Sponsor and send it to the Beneficiary. If the Operator has been set up as an agent for the Beneficiary, the Operator can send the tax receipt (if applicable) to the Sponsor or the Individual, or alternatively, the Beneficiary can send the tax receipt to the Sponsor or the Individual. The system logo
- 20 can be displayed in association with the name of the company and/or its product indicating participation in the system.

In a further embodiment of the present invention, the Operator of the donation system can be providing a service to both the Sponsors and the Beneficiaries enabling a

- 25 business method to be centered on the relationships between the Sponsors, Beneficiaries and the Operator. As such the Operator may request a fee based on a percentage of the donations directed to Beneficiaries from the Sponsors, wherein these donations are conducted using the donation system of the Operator. The Operator may act as a "middle man" for a Sponsor, which may distance a Sponsor from an
- 30 Beneficiary, if for example the Beneficiary becomes involved in a controversy. In this manner, the Operator may act as a shield for the Sponsor. Furthermore, the Operator is providing a service to the plurality of Beneficiaries by enabling a means for said

Beneficiaries to obtain donations from a plurality of Sponsors, with the Operator acting as a conduit for said donations.

With reference to Figure 1, in one embodiment, the invention comprises a software-enabled computer-implemented donation system for enabling an Individual to effect a donation to an Beneficiary on behalf of a Sponsor. The information regarding the plurality of Sponsors and Beneficiaries is maintained within a Sponsors database **100** and an Beneficiaries database **110**, respectively. Each Sponsor and Beneficiary will be registered on the system and the respective information will be maintained in the respective databases. The Sponsors database **100** contains information with respect to the Sponsor comprising the products and/or services that can be purchased by the Individual, the type and amount of a contribution made to an Beneficiary upon the purchase of a product and/or service by a Individual and the Sponsor specified criteria, if identified, for the interconnection of said products and/or services with a particular Beneficiary(s). The Beneficiaries database **110** contains information with respect to the Beneficiaries comprising the objectives, goals, causes projects and missions of the Beneficiary. The matching means **120** proceeds to interconnect the products and/or services of each Sponsor or the Sponsor themselves with Beneficiaries based on Sponsor specified criteria and/or other criteria thus creating a Beneficiary List associated with each Sponsor or Sponsor's product. Upon the purchase of a product or service, which establishes the Event Value, the Individual can enter the contribution means through a system access point incorporated into the event trigger means **135** which directs the Individual to the selection means **130**. The selection means **130** provides a means for the Individual to select the preferred Beneficiary, from the Beneficiary list, to which a donation is to be made. The contribution means **150** proceeds to calculate the donation to be made to the selected Beneficiary, based on the predefined criteria (Terms of Donation and the Event Value). Said contribution can be collected by the Operator from the Sponsor and transferred to the Beneficiary at predetermined intervals by the financial means **170**. These intervals can be determined based on a date or a monetary amount or any other criteria at which point the accrued donation is transferred to the Individual selected Beneficiary(s). In order to complete the process the Beneficiary or the Operator on behalf of the Beneficiary

will issue a tax receipt to the Sponsor for the contributions received by said Beneficiary from said Sponsor.

In a further embodiment of the present invention and with reference to Figure 2, the Beneficiary List can be predetermined by the Sponsor based on information on the possible Beneficiaries contained in the Beneficiaries database 110 and saved in the Sponsors database 100. In this embodiment, a matching means is not incorporated into the system, since this matching is predetermined. The appropriate Beneficiary list is transmitted to the selection means 130 upon the entry of an Individual into the system in relation to the completion of an event in association with a particular Sponsor, wherein the transmitted Beneficiary list corresponds to the particular Sponsor. The remainder of the system performs in a manner as described above.

Elements and Beneficiary of the Donation System

The donation system according to one embodiment of the present invention is schematically represented in Figure 1, and each of the components is further described below.

Sponsors Database 100

The system comprises a database of Sponsors who have applied to participate in the system. This database contains a plurality of information about each Sponsor and the products and/or services they are registering with the system. Furthermore, the Sponsors database may include information regarding the desired criteria determined by the Sponsor which is used by the matching means to correlate said Sponsor with one or more Beneficiaries. In addition, the criteria or Terms of Donation, used to determine the value of donation to be made by the Sponsor upon selection of a Beneficiary by an Individual, is also contained in the Sponsors database.

The Sponsors database further comprises the Terms of Donation, which provide a means for determining the donation to be made to a Beneficiary by a Sponsor. For example, if 50 computers are purchased the Sponsor will donate one computer; if 1 dollar is spent the Sponsor will donate 1 cent or if a survey is completed the Sponsor

will donate 10 cents or if one bottle of water is purchased the Sponsor will donate 5 cents. The Terms of Donation in conjunction with the Event Value establish the donation to be made by the Sponsor to the selected Beneficiary.

- 5 In one embodiment of the present invention, each Sponsor is assigned a unique personal identification number (Sponsor ID), in the form of for example a nine digit number, which provides a means for identifying each.

- The above mentioned Sponsor information may be identified by a particular "tag"
- 10 such that each means (for example, the matching means or the contribution means) of the present invention is able to efficiently locate and identify the information required for the execution of a process associated with each means. For example, the criteria used to match Sponsors and Beneficiaries can be "tagged" for quick access to said information by the matching means, thus enabling efficient matching of Sponsors and
- 15 Beneficiaries.

Beneficiaries Database 110

- The Beneficiaries that are interested in partaking in the present invention, register
- 20 themselves with the Operator as the intended recipients for any donations or grants generated by the Sponsor's sale of goods and services. Thus, the system comprises a database of Beneficiaries, including information about each Beneficiary, their cause and the projects that the contribution will support, objectives and accomplishments of the Beneficiary. The Beneficiary list of Beneficiaries can generally share a common
- 25 theme such as charity organizations, universities, hospitals, shelters, causes, research organizations, etc.

- In one embodiment of the present invention, each Beneficiary is assigned a unique personal identification number (Beneficiary ID), in the form of for example a nine
- 30 digit number, which provides a means for identifying each Beneficiary.

One aspect considers the reference of each system as a "Circle," defined by the database of Beneficiaries as a "Circle of (a theme)." Thus, one embodiment

comprising charity Beneficiaries could be referred to as a "Circle of Charity"; another embodiment comprising hospitals could be referred to as a "Circle of Health," and so on, including: "Circle of Safety," "Circle of Education," "Circle of Generosity," etc.

- 5 The "circle" involves the "companies" as Sponsors, the "customers" as Individuals, the "causes" as Beneficiaries which are the recipients of funds and thus the "Beneficiaries" benefiting from the donations. Each participant within the circle benefits from their involvement, with the Operator of the donation system creating the "circle".

10

The information contained in the Beneficiaries database may be "tag" in a fashion similar to that defined for the Sponsors database, thus providing a means for easy identification of information required by each of the means of the present invention, for example the selection means or the contribution means.

15

Matching Means 120

- In the present invention a matching means is used to link and/or recommend possible links, between causes, projects or Beneficiaries with products or services of a
- 20 Sponsor, based upon specific linking criteria. A plurality of criteria can be employed to generate these links, for example, the linking of products, services or Sponsors with Beneficiaries, which reflect similar attributes. An example of this type of link is represented by the interconnection of a medical product for a particular ailment with an Beneficiary striving to cure said ailment. The matching means can provide links
- 25 based on parameters set by the Sponsor, Beneficiary or the Operator.

- In one embodiment of the present invention, a particular campaign is created wherein the campaign is established to raise money for cancer, for example. When a Sponsor registers with the donation system, said Sponsor selects the campaigns to which they
- 30 wish to be associated and therefore wish to contribute. In addition, each Beneficiary can be assigned to a particular campaign based on the Beneficiaries objectives and mission, for example. By correlating the information with respect to the Sponsors and Beneficiaries which are related to a particular campaign, the matching means is able to

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correlate the Sponsors with Beneficiaries, thus establishing a list of Beneficiaries to which an Individual select a Beneficiary to direct the contribution of particular Sponsor.

5 In one embodiment, the Sponsor chooses one or more Beneficiaries from the Beneficiaries database to be linked with, thus creating a Beneficiary list, and allows the Individual to choose a Beneficiary, which can receive a donation, from the Beneficiary list. For example, a bottled water company seeks to spread its image by participating in a system such as a "Circle of Charity." The Sponsor might choose
10 three causes such as: 1) a water relief program; 2) a water purification project; and 3) a research project for the removal of toxic organisms, with these choices forming the Beneficiary list. The Sponsor determines the Terms of Donation and may pledge that \$0.08 of each \$ 1.00 will be transferred to one of these causes. An Individual, which might be a church group, could decide to purchase this Sponsor's bottled water and
15 directing the donation to be transferred to selection 2) the water purification project. The completion of this purchase or event can provide a trigger for the Individual to enter the donation system and select the desired Beneficiary as previously mentioned. If they purchase a six month supply of water costing \$800.00, which is the Event Value, the bottled water company (the Sponsor) would send \$64.00 as determined
20 based on the Event Value and the Terms of Donation (for example, $800(EV) \times 0.08(TOD) = 64(\text{donation})$), to the Operator, which would forward the money to the Beneficiary and a tax receipt back to the Sponsor. The directing or monitoring of the transfer of the money from the Sponsor to the Beneficiary is controlled by the financial system.

25 *Event Trigger Means 135*

The event trigger means provides a method for the Individual to enter the donation system of the present invention. This access is provided upon the completion of an
30 event trigger by the Individual, for example, the purchase of a product or the participation in a survey, wherein this event trigger is associated with the donation system. The completion of an event trigger establishes an event value (EV) associated with an event. For example, a Sponsor may set an Event Value equal to 1 for the

completion of one survey by an Individual, with the Event Value and the Terms of Donation enabling the determination of the donation to be made by the Sponsor to the Beneficiary.

- 5 Incorporated into the event trigger means is a system access point which provides a means that the Individual to enter the donation system upon the completion of a event trigger. The system access point can take several forms, for example in an on-line scenario, a system logo associated with the donation system can be a "hyper-link" which is activated upon the purchase of a product or service, with this "hyper-link"
- 10 providing a means for connecting the Individual's web browser directly to the donation system of the present invention.

- In one embodiment of the present invention, the system access point can provide a means for authorizing an Individual for use of the donation system. For example, the
- 15 system access point may require the Individual to follow a login procedure which may comprise verification that a particular product or service which is linked with the donation system has been purchased. As an example, the completion of such a purchase may result in a login name and password being transmitted to the Individual's computing device, therefore providing a means for said Individual to
- 20 obtain entry authorization and enter the donation system.

- In addition, system access may be possible through off-line means for example though a voice message system, providing a means for the Individual to interact with the system in an off-line scenario.

25 *Selection Means 130*

- The selection means is linked to the matching means and presents the Individual with a Beneficiary list linked with a particular Sponsor or a particular product of a Sponsor,
- 30 as previously determined by the matching means. The Individual, upon entering the donation system through the access point, is provided with a means for selecting the preferred Beneficiary to which the donation is to be made by the Sponsor. Upon selection of a Beneficiary by the Individual, the selection means records the selection

and transmits the selection information to the contribution means. The selection means enables the Individual to actively participate in the selection of the Beneficiary to which a Sponsor makes a donation.

- 5 In one embodiment of the present invention, an Individual is able to select a cause or campaign and identify Sponsors registered with the system which support the specific cause. This method provides a means for an Individual to identify a Sponsor from which to make a purchase, for example, based on the identified causes or campaigns and Beneficiaries, which a Sponsor has selected to support.

10

Contribution Means 150

- Upon the selection of a particular Beneficiary by the Individual, the contribution means accesses the Sponsors database and retrieves the Terms of Donation (TOD),
15 using the TOD and the Event Value to calculate the value of the donation, to be directed to the Beneficiary. The TOD may predetermined by the Sponsor and can be based on one or more of parameters, for example, a set monetary amount per sale, a percentage of the total sale value, a product donation or any combination thereof.

20 *Financial Means 170*

- The donation system comprises a central hub, through which the Operator monitors and/or transfers the money or other considerations to one or more Beneficiaries as per the arrangement with the Sponsor.

25

- There are many different ways in which the donation can be performed, for example there may be trust funds established with the Operator on behalf of the Sponsor and or Beneficiaries, wherein the Operator transfers funds between these funds based on the interaction of Individuals with the donation system. The following embodiments are
30 examples of possible methods of donation transmission, however any system may be used provided that the donation is transferred from the Sponsor to the Beneficiary.

In a one embodiment, the Operator collects the money from the Sponsors and transfers the money to the selected Beneficiaries, subsequently preparing and sending tax

receipts to the Sponsors on behalf of the Individual selected Beneficiary. This embodiment ensures a level of legitimacy for the system in addition to the efficient transfer of the funds.

5 In one embodiment of the present invention, the transfer of funds from a Sponsor to a Beneficiary can be performed on a periodic basis. For example, the transfer may be initiated by accruing a Sponsor's donation to a predetermined monetary value or reaching a predetermined time interval, with these monetary transfer triggers being pre-selected by the Sponsor, for example. Upon the triggering of a monetary transfer,
10 the Operator can collect the accrued pledged amount from the Sponsor by electronic fund transfer (EFT), for example. Upon receiving the donation from the Sponsor, the Operator deducts a fee for the use of the donation system, which may be a percentage of the total donation and subsequently proceeds to transfer the remaining money to the plurality of Beneficiaries. The Beneficiaries receive donations calculated based on the
15 selections made by the Individuals using the selection means.

In an alternative method, the transfer of funds from a Sponsor to the Operator can occur immediately upon the selection of a Beneficiary by an Individual, with this fund transfer being conducted by EFT, for example. Upon receiving the contribution from
20 the Sponsor, the Operator deducts a fee for the use of the donation system, which may be a percentage of the donation and subsequently proceeds to transfer the remaining money to the plurality of Beneficiaries. The Beneficiaries receive donations calculated based on the selections made by the Individuals using the selection means.

In order to reduce EFT charges, the Operator may transfer the accrued funds to the
25 Beneficiaries on a predetermined interval, for example once a day or a specific accrued donation value.

In a further embodiment, the Sponsor can transfer the funds directly to the Beneficiary which can send the tax receipt to the Sponsor. In such a situation, both the Sponsor
30 and the Beneficiary will report to the Operator, who would simply monitor that the system proceeds in a legitimate manner.

In a one embodiment, the money and tax receipts are transferred electronically. In such a system, the transfer of money and receipt can occur simultaneously.

5 In a one embodiment, the Operator obtains periodic audits of the Sponsor's sales to ensure legitimacy of the value of the donation.

In a further embodiment of the present invention and with reference to Figure 2, the donation system further comprises an Individuals Database **140** and Reporting Means **160**.

10

Individual Database 140

The system optionally comprises a database of Individuals who wish to become members of the system. In one embodiment of the present invention the Individual
15 database contains Individual information that identifies the Individual (for example, name and email), together with the Individual's selection of products and/or services which enabled entry into the system and the Beneficiary(s) selected by said Individual.

This information can be transmitted to the Sponsor providing valuable information on the Individual enabling the development of new product lines, for example. Upon
20 selection of the Beneficiary the Individual database will be updated with the above mentioned preferences of the Individual.

In one embodiment of the present invention, each Individual is assigned a unique personal identification number (Individual ID), in the form of for example a nine digit
25 number, which provides a means for identifying each Beneficiary.

The information contained in the Individuals database may be "tagged" in a fashion similar to that defined for the Sponsors database, thus providing a means for easy identification of information required by each of the means of the present invention,
30 for example the reporting means.

Reporting Means 160

The reporting means generates a collection of reports based on the system's

interaction with Beneficiaries, Sponsors and Individuals, with this information being contained in the Beneficiaries database **110**, Sponsors Database **100** and the Individuals database **140**, respectively. These reports can include for example aggregated data based on Individual participation in the system, the ranking of Individual selected Beneficiaries or the ranking of the purchases made by the Individual.

In one embodiment of the present invention, the reporting means generates reports for the Sponsors, Beneficiaries and the Operator providing a means for each to evaluate their roles in the donation system of the present invention. For example, a Sponsor's report may comprise the Beneficiaries to which contributions have been made and the value of the transactions; an Beneficiaries report may comprise the Sponsor's from which contributions have been made and the value of the transactions; an Operator's report may comprise information related to the Sponsors, Beneficiaries and Individuals that have participated in the system, together with a complete list of the financial transactions which have taken place. It is obvious that a plurality of additional reports can be generated based on information contained on the plurality of databases of the donation system and should not be limited to the ones described above.

System Architecture

Figure 3 illustrates a schematic of the general architecture of one embodiment of the donation system that operates in accordance with the present invention.

An Individual operating a computing device **220**, gains access to the internet **205** by use of an internet gateway **210**, wherein said internet gateway **210** can provide wired or wireless access to the internet based on the configuration of the Individual's computing device **220**. For example, an Individual's computing device **220** can be a home computer which is configured to operate using transmission control protocol/internet protocol (TCP/IP) or the Individual's computing device can be a personal digital assistant configured with wireless application protocol (WAP) and thus enabling it to communicate in a wireless manner. The Individual proceeds to access

the donation system comprising a plurality of databases **100, 110, 140** and a plurality of computational servers **200**, via a system access point **135**. The system access point **135**, can provide a means for authorizing an Individual for use of the donation system.

For example, the system access point **135** may require the Individual to follow a login procedure which may comprise verification that a particular product or service which is linked with the donation system has been purchased. As an example, the completion of a purchase may result in a login name and password being transmitted to the Individual's computing device, therefore providing a means for said Individual to enter the donation system. Upon entry into the donation system the Individual's computing device may interact with one or more computational servers **200**, with these computational servers **200** performing tasks as outlined above based on a plurality of instruction sets configured in software contained thereon. The computational servers **200** may be interconnected, providing a means for computational load sharing between said computational servers **200**. For example, a new task may be executed by the least active computational server **200** and therefore may improve the response time of the donation system, as would be known to a worker skilled in the art. The computational servers **200** interact with the Individual's computing device **220** and the plurality of databases **100, 110** and **140**, thus obtaining information necessary for enabling said servers **200** to perform the tasks as outlined above.

In one embodiment of the present invention, an Individual authorized to use the donation system is only provided means to interact with the selection means and while the information contained on the plurality of databases may be viewed by an Individual, modification of this information is not permitted.

In one embodiment of the present invention, the communications between the Individual's computing device and the donation system are conducted in a secure or encrypted manner using for example secure socket layer (SSL) encryption protocol. Therefore providing added security for the information transmitted between the Individual's computing device and the donation system.

An Embodiment using the Internet

In one embodiment of the present invention the system and method can be implemented in an on-line setting, therefore the Individual may purchase items and/or services while connected to the internet. The system can be activated by a purchase of an item by an Individual, with this item being associated with a particular or multiple Beneficiaries. This link between a Sponsor and a Beneficiary(ies) can be identified, for example, in the form of a logo displayed in conjunction with the appropriate article or service on the Individual's computer display. Upon completion of the purchase of the product(s) and/or service(s) the Individual is provided with a means for selecting the desired Beneficiary to which the contribution will be donated. This on-line selection means can be located, for example, at the Operator's website or the Sponsor's website or any other suitable location, which is accessible from the on-line purchase location. Upon selection of the desired Beneficiary by the Individual, the predetermined rate of contribution for the purchase made will be contributed to the desired Beneficiary.

In a further embodiment of the present invention, an Individual is provided a means for referring a plurality of additional Individuals to the donation system of the present invention. This referral may promote additional sales for the Sponsors and additional donations to the Beneficiaries from said Sponsors.

In one embodiment, the Operator organizes the registrations of Sponsors and Beneficiaries into a database of records, which is accessible via the Internet. By accessing this database, the Operator enables an Individual to obtain the records that are relevant for their purposes. The Individuals can use a search apparatus to identify goods or services that are linked to a Beneficiary of interest to them. The method and search apparatus searches the databases, which can include Internet records and premium content records, to generate a search result list corresponding to a selected set of records. The results from such search instructions can be displayed or printed on the Individual's display or printer. Each record within the databases is classified according to various meta-data attributes (for example whether it is a good or a

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service, the number of links to an Beneficiary, the time duration when a such link will be active, the geographic zone that is affected by the good or service decision, the amount and form of contribution or donation that is pledged by each Sponsor, language characteristics etc.). Because such a task is an onerous one to carry out
5 manually, substantially all of the records are automatically classified into the proper categories by a classification means. The classification means automatically determines the various meta-data attributes when such attributes are not editorially available from the source.

- 10 In a further embodiment of the present invention the purchase of goods and/or services can occur in an off-line scenario, for example the purchase of a product is performed within a store setting. The functionality of the system would be unchanged, but the Individual's selection of the desired Beneficiary associated with the selected good(s) and/or service(s) would be performed using a different method
15 from that described in the on-line embodiment. For example, the Individual can mail a card into the Operator indicating their selection, or use an interactive voice response system where the selection of the Individual is conducted over the telephone for example. As with the previous, on-line embodiment, this selection process is initiated once a purchase has been made and the selection of the Beneficiary is made from a
20 predetermined collection of said Beneficiaries.

The invention being thus described, it will be obvious that the same may be varied in many ways. Such variations are not to be regarded as a departure from the spirit and scope of the invention, and all such modifications as would be obvious to one skilled
25 in the art are intended to be included within the scope of the following claims.

**THE EMBODIMENTS OF THE INVENTION IN WHICH AN EXCLUSIVE
PROPERTY OR PRIVILEGE IS CLAIMED ARE DEFINED AS FOLLOWS:**

1. A computer implemented donation system having a program embodied on a
5 computer-readable medium enabling an Individual to effect a donation from a
Sponsor to a Beneficiary, said donation system comprising:
 - a) a Beneficiaries database, wherein said database contains particulars relating to
the Beneficiaries participating in the system;
 - b) a Sponsors database, wherein said database contains particulars relating to the
10 Sponsors participating in the system and terms of donation associated with
each Sponsor and optionally a Beneficiary list;
 - c) an event triggered entry point providing a means for Individuals to enter the
system, wherein said event is associated with a particular Sponsor and wherein
the completion of said event generates an event value;
 - 15 d) a selection means for enabling the Individual to select a Beneficiary to receive
the donation from the Sponsor, wherein said Beneficiary is selected from the
Beneficiary list;
 - e) a contribution means for determining the donation based on the terms of
donation related to the Sponsor and the event value; and
 - 20 f) a financial means for performing or monitoring transfer of the donation from
the Sponsor to the Beneficiary selected by the Individual.
2. The donation system as claimed in claim 1, further comprising a matching means
for electronically correlating Beneficiaries and Sponsors based on particulars
25 contained in the Beneficiaries database and the Sponsors database. wherein said
correlation results in generation of a Beneficiary list.
3. The donation system as claimed in claim 1, wherein the entry point further
comprise a means for authorizing an Individual's access to the donation system.
30
4. The donation system as claimed in claim 1, wherein said transfer of the donation is
performed using electronic fund transfer.

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5. The donation system as claimed in claim 1, wherein said donation system generates and sends a tax receipt.

5 6. The donation system as claimed in claim 6, wherein said tax receipt is transmitted electronically.

7. The donation system as claimed in claim 1, wherein said system additionally comprises an Individuals database wherein said Individuals database contains
10 particulars relating to a plurality of Individuals.

8. The donation system as claimed in claim 1, wherein said system additionally comprises a reporting means for generating a plurality of reports based on particulars contained on databases selected from the group comprising Sponsors
15 database, Beneficiaries database and Individuals database.

9. A donation system comprising:

a) a Beneficiaries database, wherein said database contains particulars relating to the Beneficiaries participating in the system;

20 b) a Sponsors database, wherein said database contains particulars relating to the Sponsors participating in the system and terms of donation associated with each Sponsor and optionally a Beneficiary list;

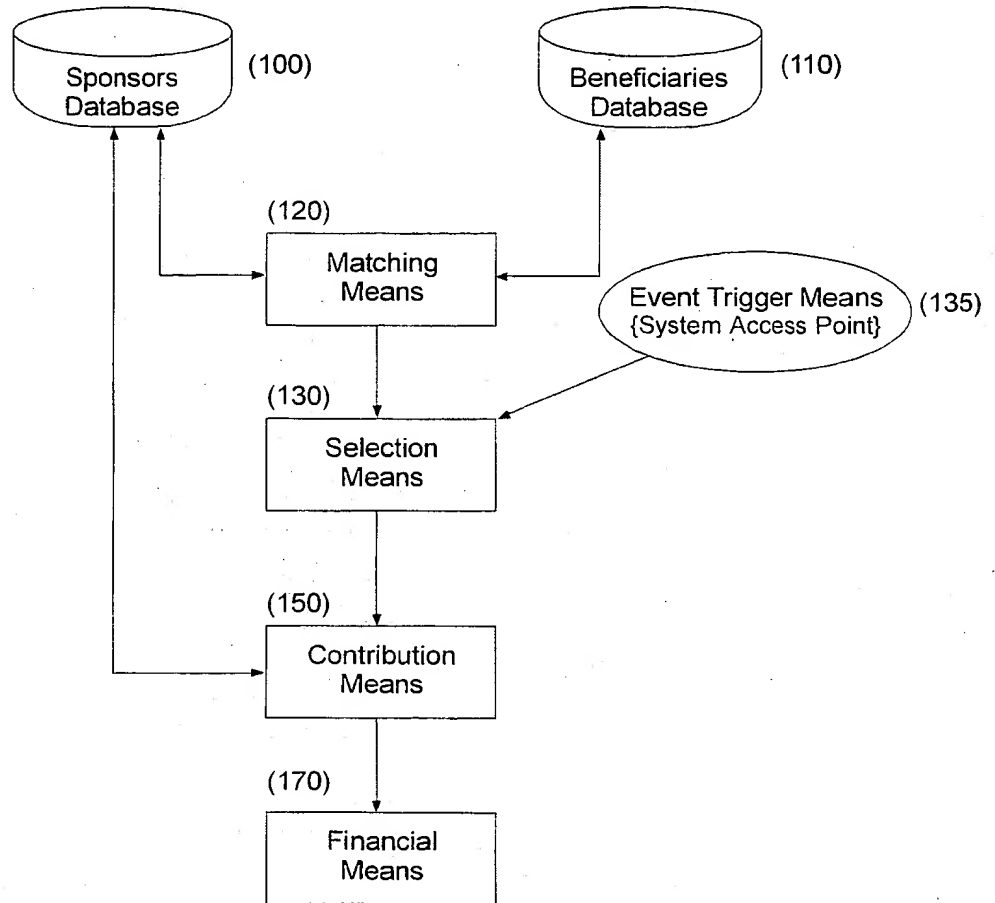
c) an event triggered entry point providing a means for Individuals to enter the system, wherein said event is associated with a particular Sponsor and wherein
25 the completion of said event generates an event value;

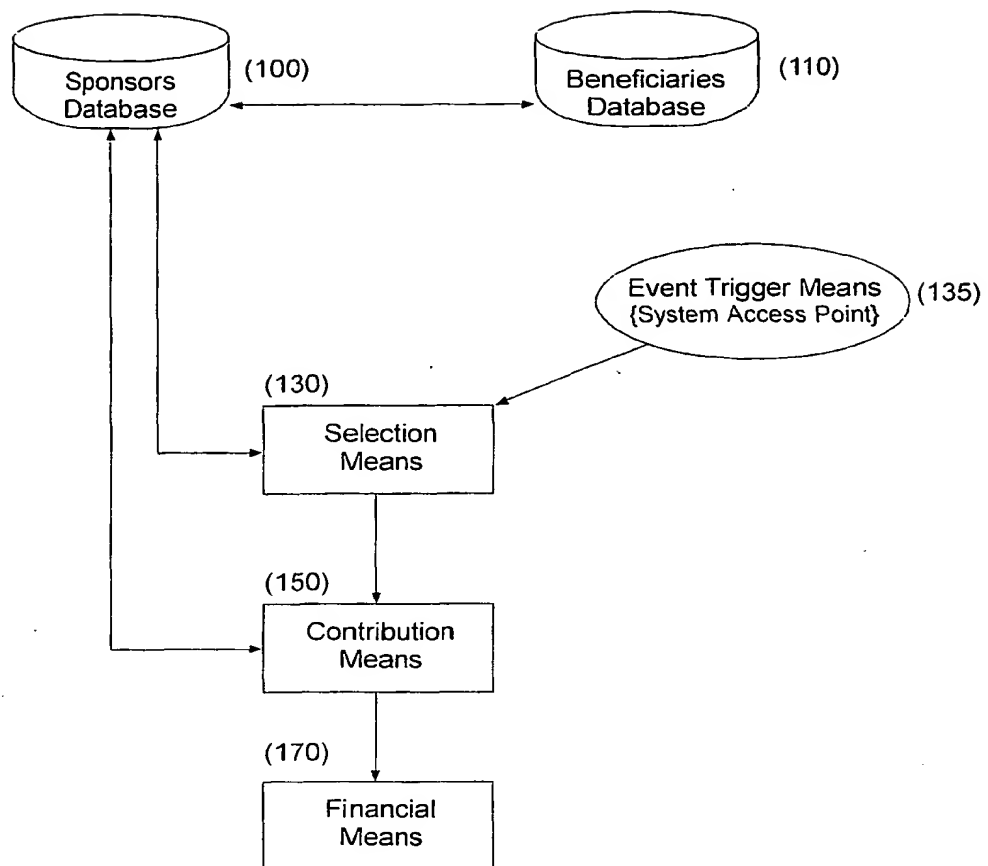
d) a selection means for enabling the Individual to select a Beneficiary to receive the donation from the Sponsor, wherein said Beneficiary is selected from the Beneficiary list;

e) a contribution means for determining the donation based on the terms of
30 donation related to the Sponsor and the event value; and

f) a financial means for performing or monitoring transfer of the donation from the Sponsor to the Beneficiary selected by the Individual.

10. The donation system as claimed in claim 1, further comprising a matching means
for electronically correlating Beneficiaries and Sponsors based on particulars
contained in the Beneficiaries database and the Sponsors database. wherein said
5 correlation results in generation of a Beneficiary list.

**FIGURE 1**

**FIGURE 2**

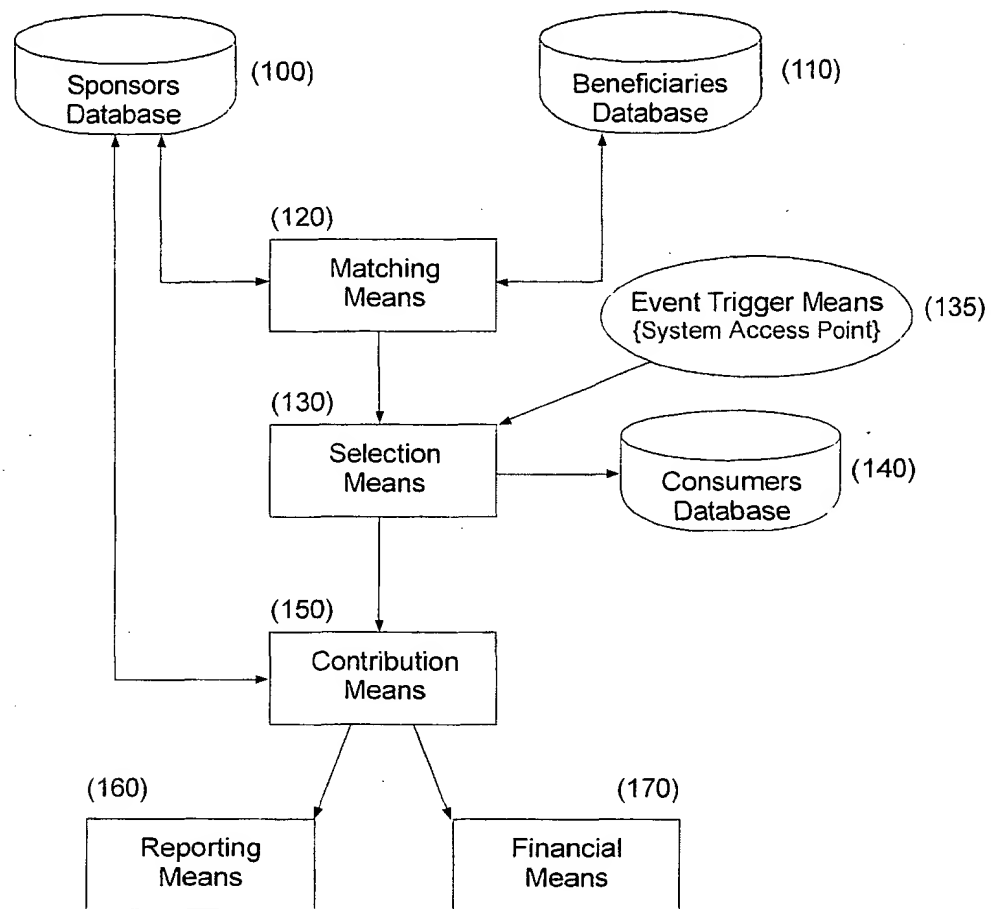
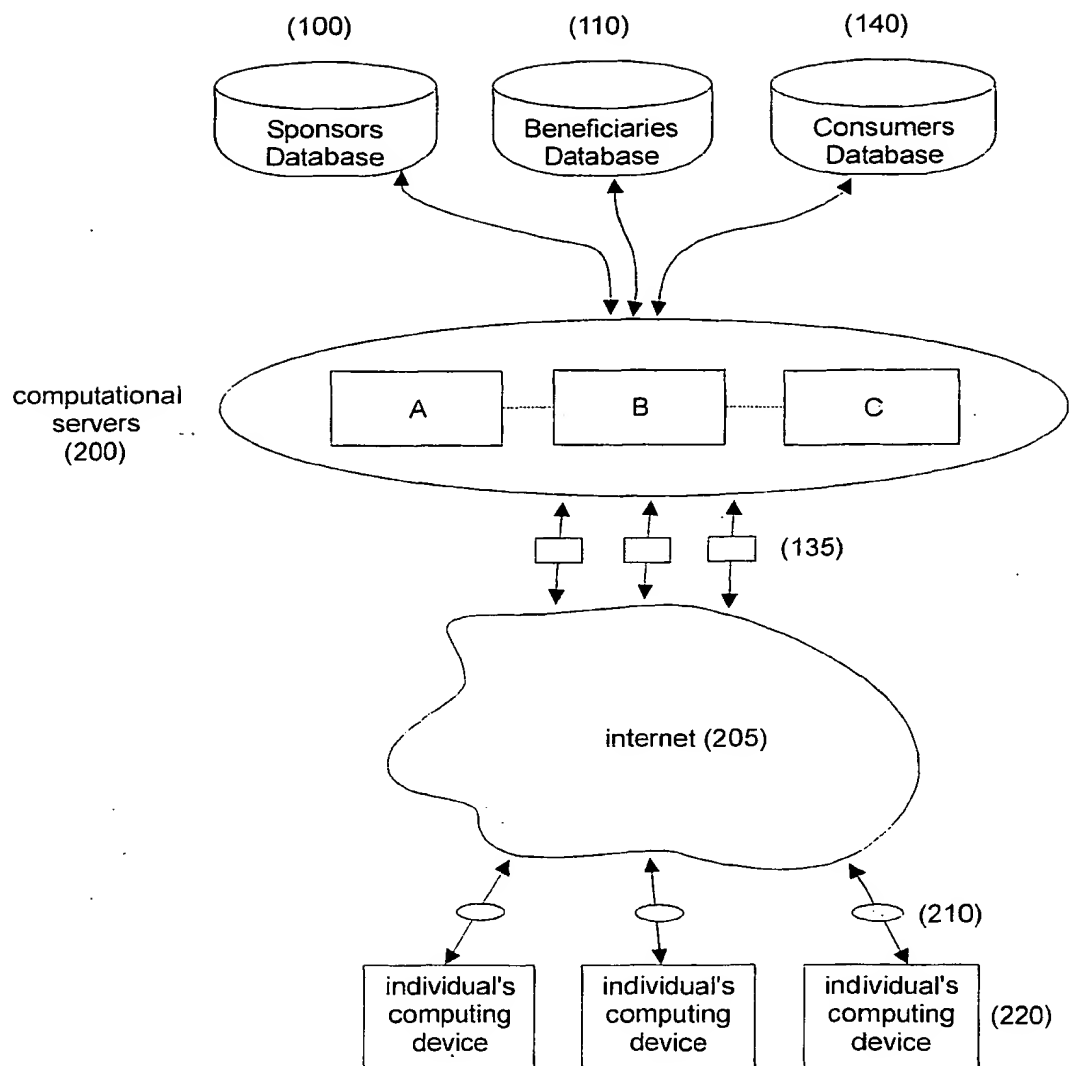


FIGURE 3

**FIGURE 4**

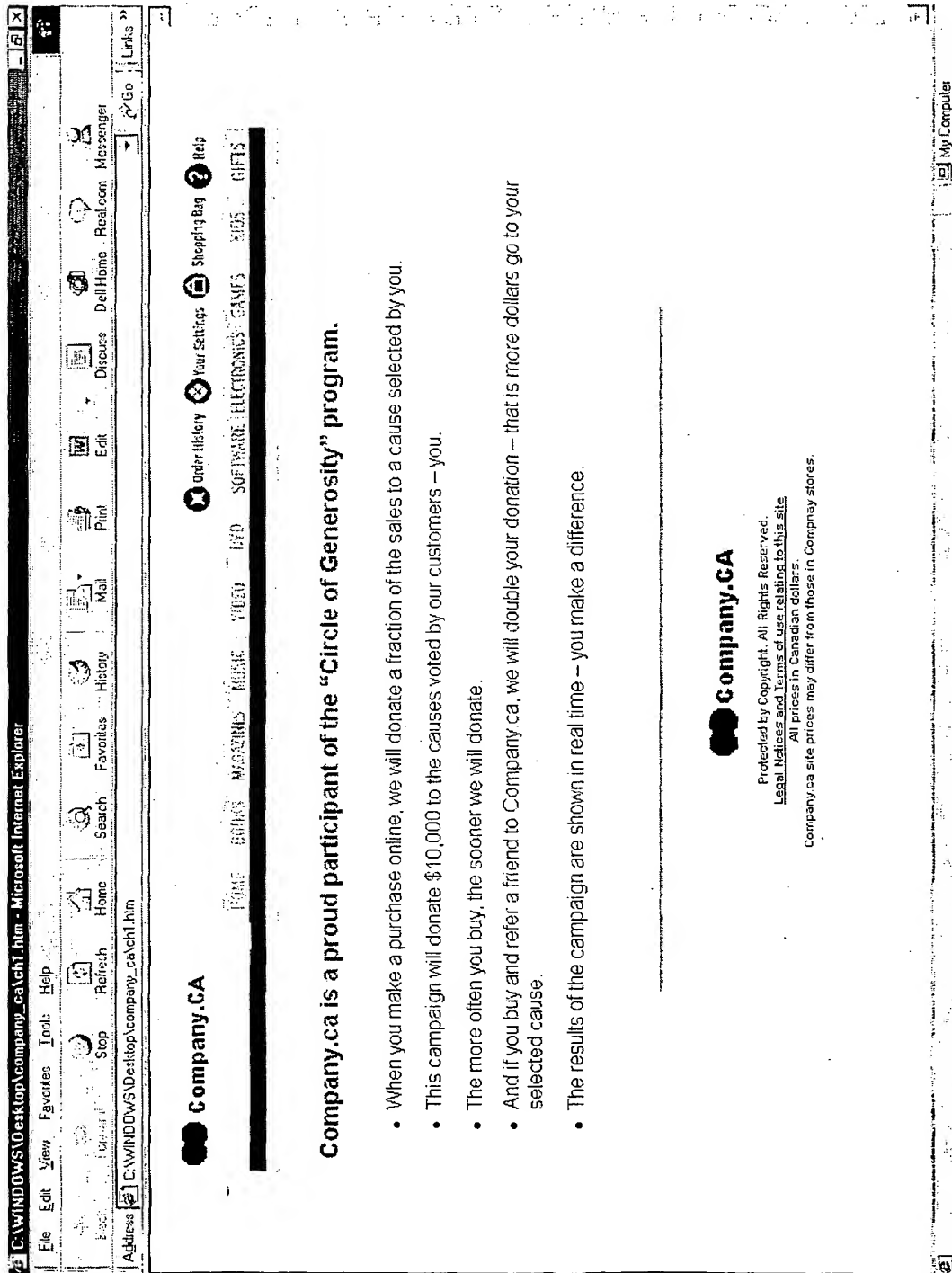


FIGURE 5

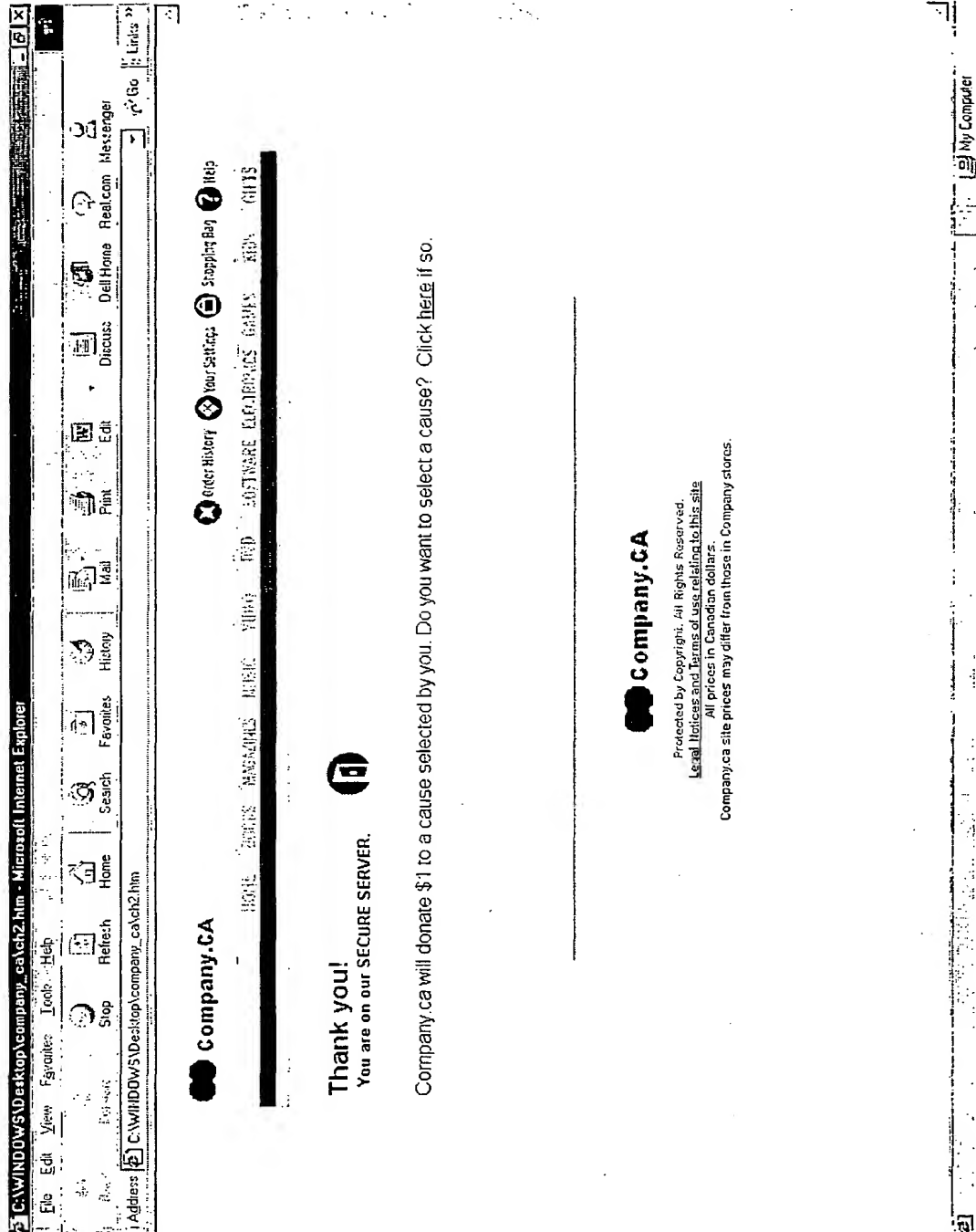


FIGURE 6

C:\WINDOWS\Desktop\company_ca\ch3.htm - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address C:\WINDOWS\Desktop\company_ca\ch3.htm

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss Dell Home Real.com Messenger

Company.CA

Vote!

Company.ca will donate \$1 towards a cause selected by you. Please select one of the following causes:

- ☐ Literacy: Provides books and tutoring to under privileged adults
- ☐ Schools: Provides funding for computers in inner city schools
- ☐ Universities: Provides support for lab equipment or scholarship
- ☐ Children: Provides toys to handicap children for their birthdays

Have you been referred by a friend?

If so please type in the referral code in this box

Company.ca will double your donation if you refer a friend.

Do you wish to refer a friend? ☐ Yes ☐ No

(Please fill in the following only if you have checked Yes)

You can refer up to 3 friends:

E-mail address 1:

My Computer

FIGURE 7

C:\WINDOWS\Desktop\company_catch3.htm - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discard Del Home Real.com Messenger Links

Address C:\WINDOWS\Desktop\company_catch3.htm

(Please fill in the following only if you have checked Yes)

You can refer up to 3 friends:

E-mail address 1: _____

E-mail address 2: _____

E-mail address 3: _____

Please enter your e-mail address: _____

☒ Please e-mail me information about new features and special offers and the progress of the campaign.

submit

The information that you are submitting will be handled securely and kept confidential.
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My Computer

FIGURE 8

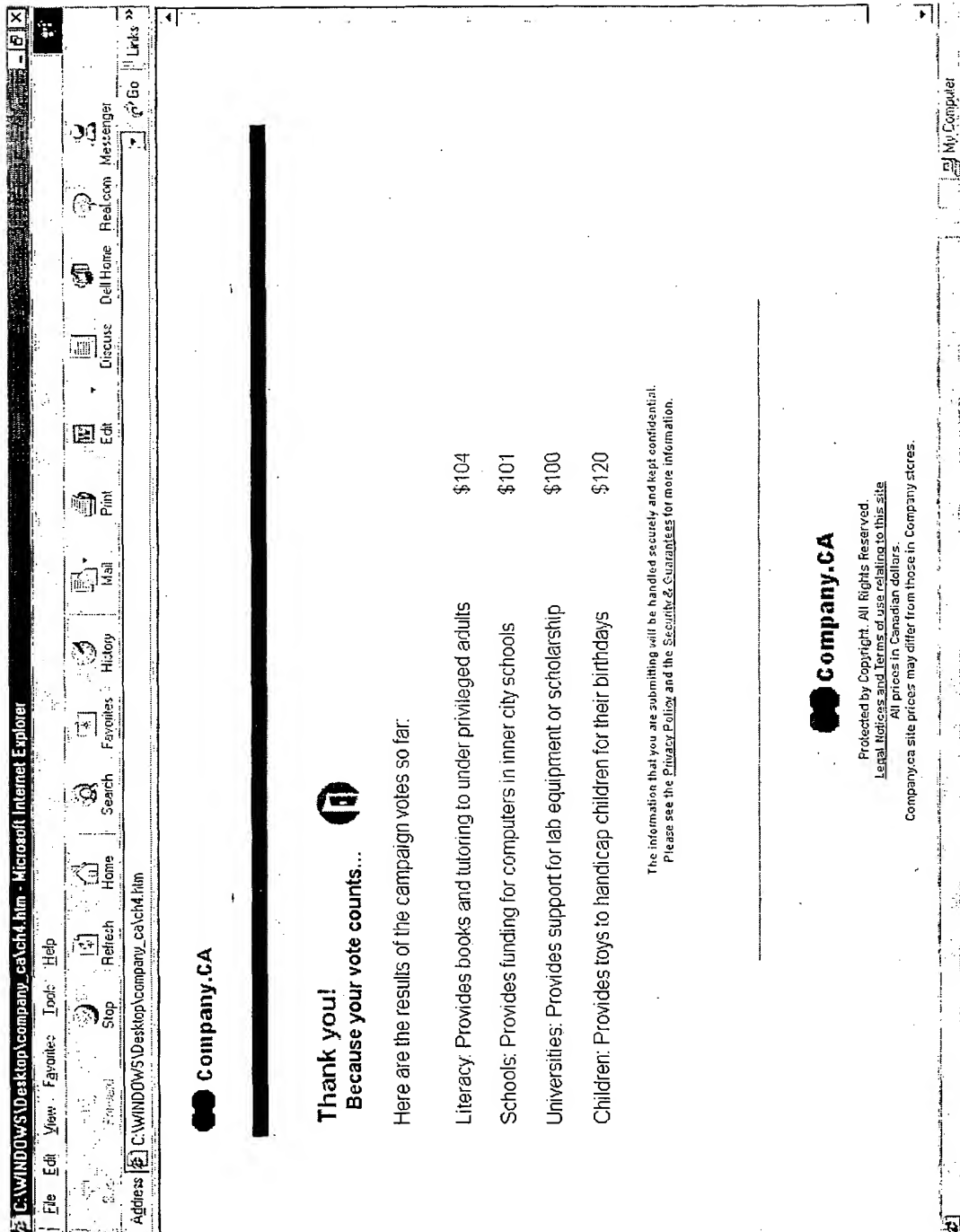


FIGURE 9

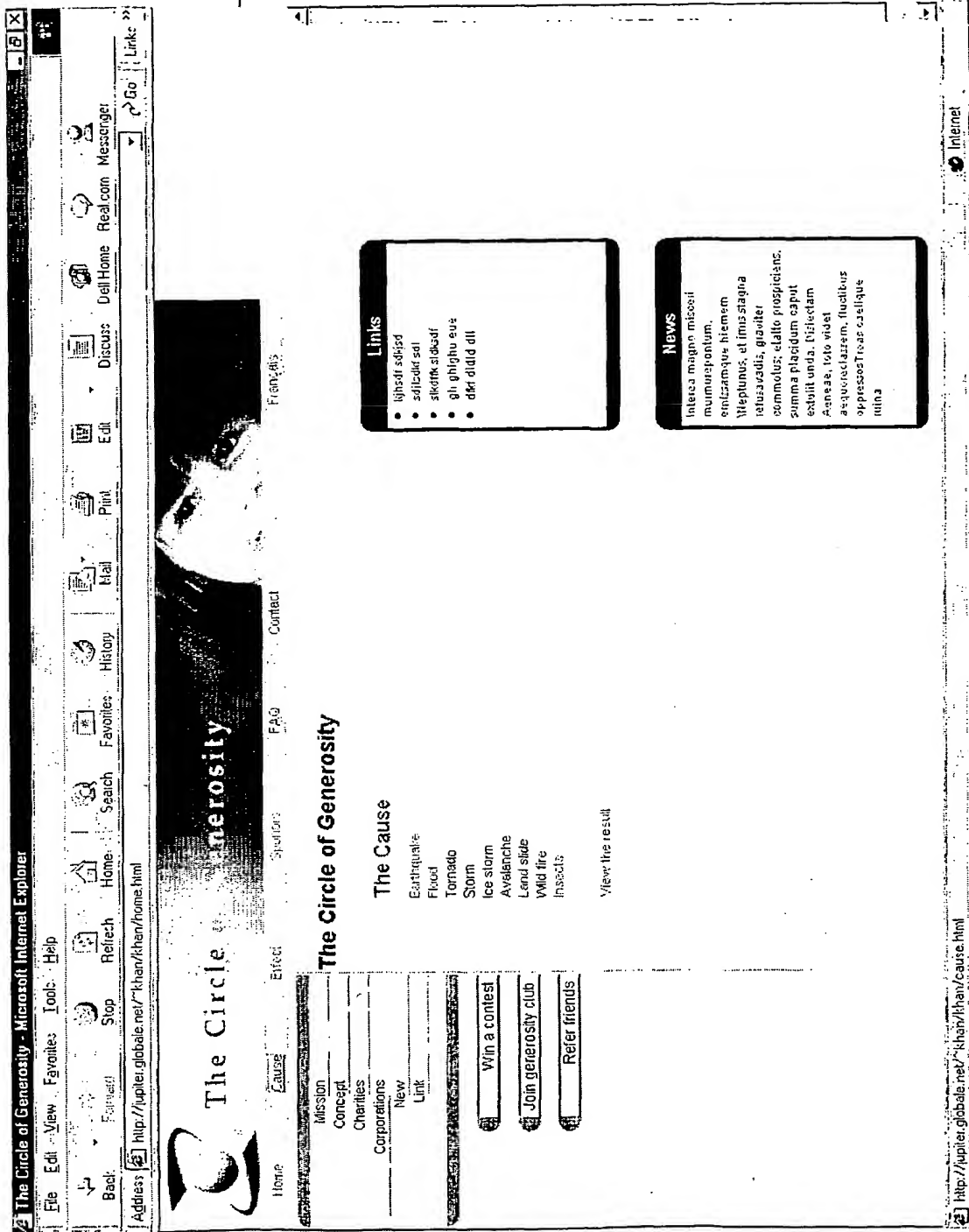


FIGURE 10

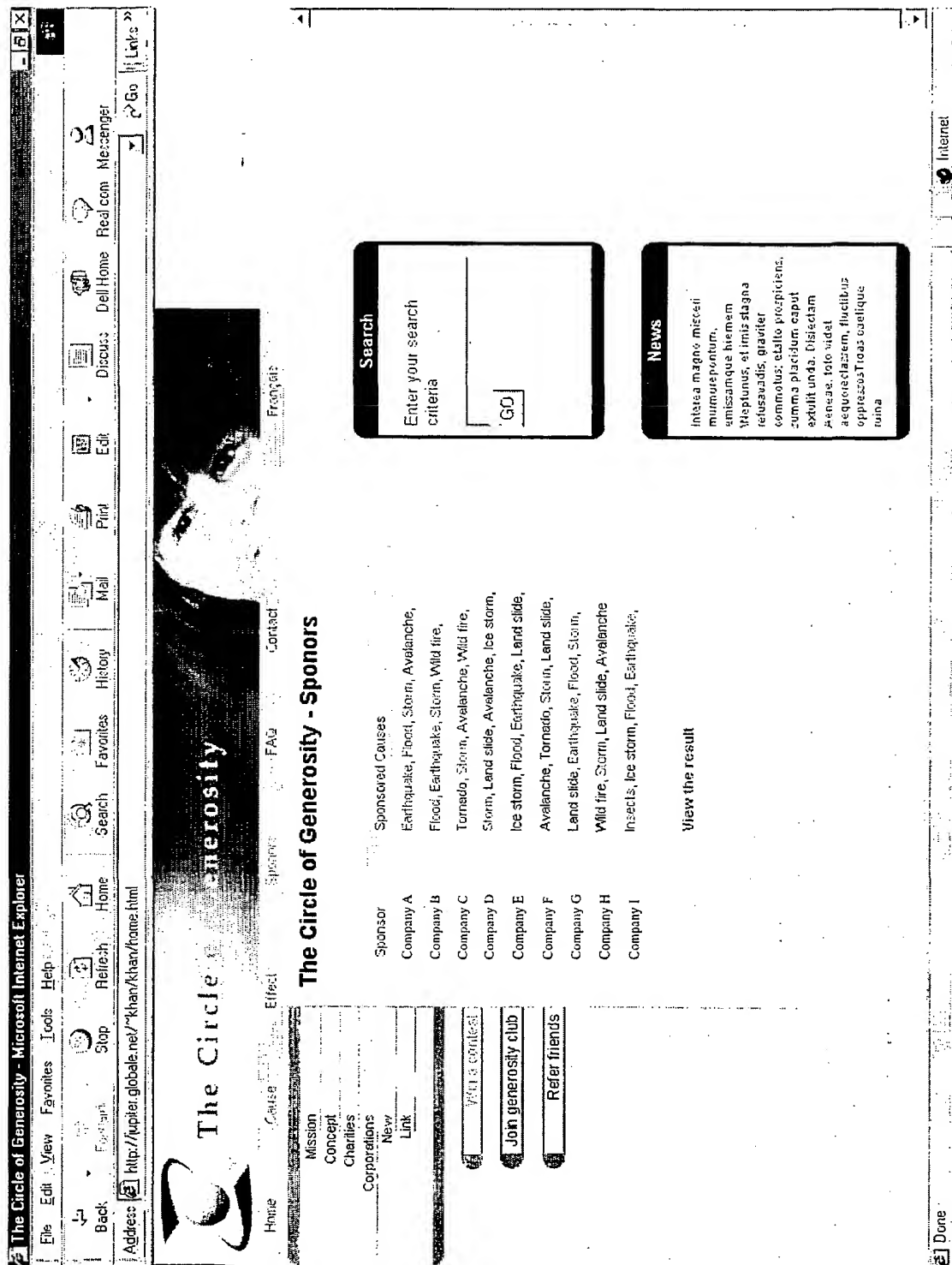


FIGURE 11



PCT

DECLARATION OF NON-ESTABLISHMENT OF INTERNATIONAL SEARCH REPORT

(PCT Article 17(2)(a), Rules 13ter.1(c) and Rule 39)

Applicant's or agent's file reference 680-103PCT	IMPORTANT DECLARATION	Date of mailing(day/month/year) 02/10/2001
International application No. PCT/CA 01/ 00933	International filing date(day/month/year) 28/06/2001	(Earliest) Priority date(day/month/year) 28/06/2000
International Patent Classification (IPC) or both national classification and IPC		G06F17/60
Applicant GENEROSITY WITHOUT BORDERS INC. et al.		

This International Searching Authority hereby declares, according to Article 17(2)(a), that **no international search report will be established** on the international application for the reasons indicated below

1. ☒ The subject matter of the international application relates to:

- a. ☐ scientific theories.
- b. ☐ mathematical theories
- c. ☐ plant varieties.
- d. ☐ animal varieties.
- e. ☐ essentially biological processes for the production of plants and animals, other than microbiological processes and the products of such processes.
- f. ☒ schemes, rules or methods of doing business.
- g. ☐ schemes, rules or methods of performing purely mental acts.
- h. ☐ schemes, rules or methods of playing games.
- i. ☐ methods for treatment of the human body by surgery or therapy.
- j. ☐ methods for treatment of the animal body by surgery or therapy.
- k. ☐ diagnostic methods practised on the human or animal body.
- l. ☐ mere presentations of information.
- m. ☐ computer programs for which this International Searching Authority is not equipped to search prior art.

2. ☐ The failure of the following parts of the international application to comply with prescribed requirements prevents a meaningful search from being carried out:

- ☐ the description ☐ the claims ☐ the drawings

3. ☐ The failure of the nucleotide and/or amino acid sequence listing to comply with the standard provided for in Annex C of the Administrative Instructions prevents a meaningful search from being carried out:

- ☐ the written form has not been furnished or does not comply with the standard.
☐ the computer readable form has not been furnished or does not comply with the standard.

4. Further comments:

Name and mailing address of the International Searching Authority



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Authorized officer

María Rodríguez Nóvoa

FURTHER INFORMATION CONTINUED FROM PCT/ISA/ 203

Claims 1 to 10 relate to commonplace technological features for performing a business method. Although these claims do not literally belong to the method category, they essentially claim protection for a commercial effect. With reference to the Guidelines, B-VIII, points 1-6, the International Searching Authority considers that searching such commercial features would serve no useful purpose. This applies to the remaining commonplace technological features of these claims as well.

The applicant's attention is drawn to the fact that claims relating to inventions in respect of which no international search report has been established need not be the subject of an international preliminary examination (Rule 66.1(e) PCT). The applicant is advised that the EPO policy when acting as an International Preliminary Examining Authority is normally not to carry out a preliminary examination on matter which has not been searched. This is the case irrespective of whether or not the claims are amended following receipt of the search report or during any Chapter II procedure. If the application proceeds into the regional phase before the EPO, the applicant is reminded that a search may be carried out during examination before the EPO (see EPO Guideline C-VI, 8.5), should the problems which led to the Article 17(2) declaration be overcome.

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